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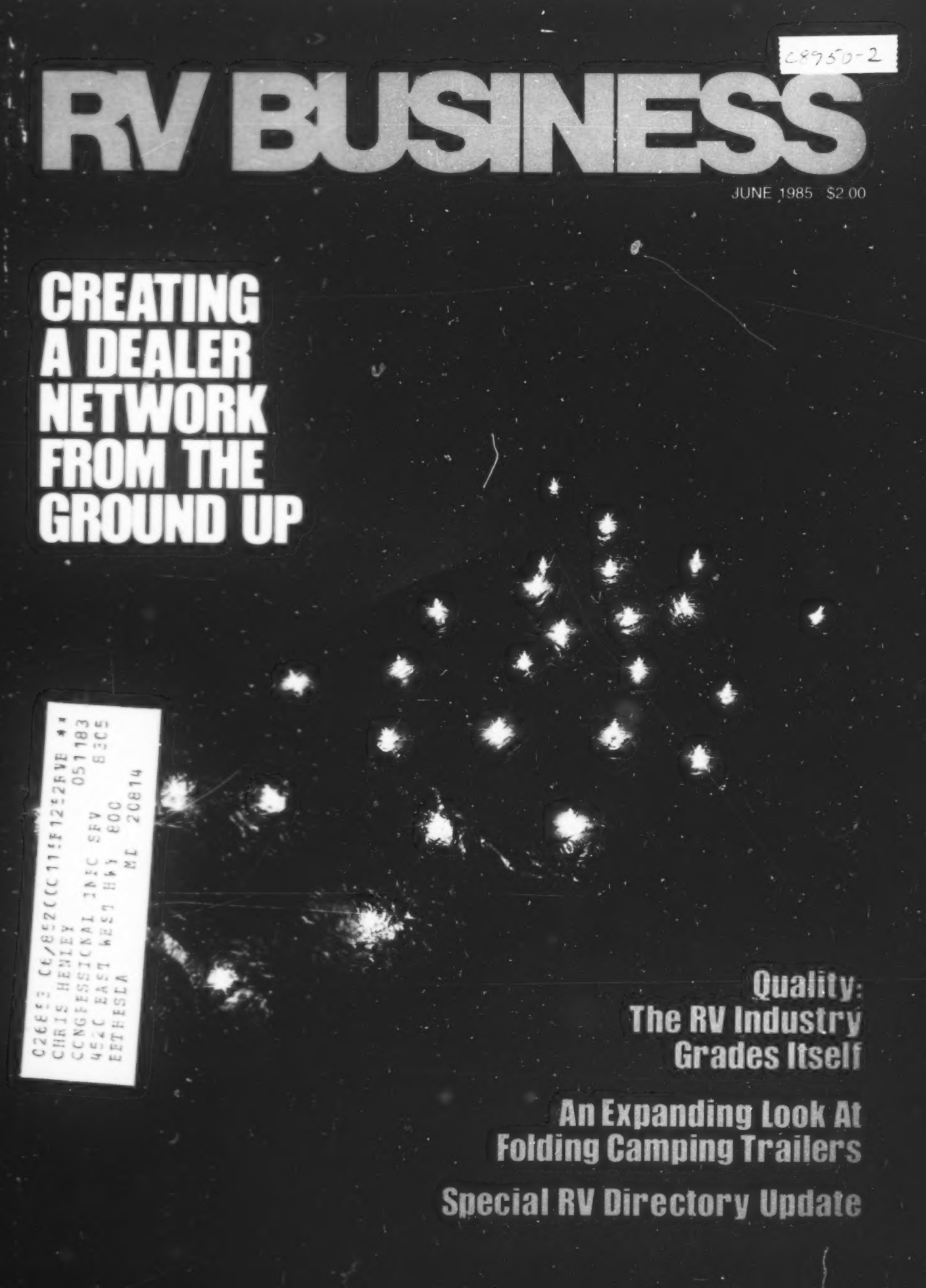
RV BUSINESS

JUNE 1985 $2.00

CREATING A DEALER NETWORK FROM THE GROUND UP



CHRIS HENLEY
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Quality: The RV Industry Grades Itself

An Expanding Look At Folding Camping Trailers

Special RV Directory Update

RV BUSINESS

A TL ENTERPRISES PUBLICATION JUNE 1985/VOL. 36, NO. 3

FEATURES

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ON THE COVER: Webster defines "network" as "an interconnected or interrelated chain, group or system." The RV industry defines it as "profitability." Discover how RV manufacturers are establishing profitable dealer networks—and how you can, too, on page 36. Photo: Hal Hunt.

Perspective

An analysis of RVB's monthly survey of its Dealer Advisory Board Members

GAYLORD MAXWELL

	NEW						USED					
	FOR MONTH			YEAR-TO-DATE			FOR MONTH			YEAR-TO-DATE		
	MARCH '85	MARCH '84	% CHANGE	1985	1984	% CHANGE	MARCH '85	MARCH '84	% CHANGE	1985	1984	% CHANGE
MOTORHOMES	136	144	– 6%	325	333	– 2	96	115	–17%	272	306	–11
TRAVEL TRAILERS	125	111	+13%	230	269	–14	110	126	–13%	195	257	–24
TRUCK CAMPERS	15	24	–38%	35	43	–19	19	17	+12%	33	48	–31
CAMPING TRAILERS	176	238	–26%	350	468	–25	54	39	+38%	80	69	+16
FIFTH-WHEELS	40	45	–11%	80	104	–23	15	14	+ 7%	31	27	+15

	FOR MONTH			YEAR-TO-DATE		
	MARCH '85	MARCH '84	% CHANGE	1985	1984	% CHANGE
SALES VOLUME	$10,967,417	$10,699,034	+3%	$24,142,473	$25,659,186	– 6
TOTAL UNIT SALES	786	873	–10%	1631	1924	–15
NEW UNIT SALES	492	562	–12%	1020	1217	–16
USED UNIT SALES	294	311	– 5%	611	707	–14

In some respects, March was a good month for the Dealer Advisory Board (DAB) and in other ways it was quite poor. Sales volume was higher than for the comparable month last year (up 3 percent), but with the exception of travel trailers, all categories of new unit sales were down. In fact, of the 28 items measured in this report, 21 were down and 7 were up.

The fact that many dealers are selling fewer units but taking in more dollars indicates that more expensive units are being purchased. The actual count for March shows 13 members of the DAB up in dollar volume and 9 down from the previous year.

March ran just a little stronger than the year-to-date tally which might suggest that things are picking up some. Unless something drastic happens to change the picture, however, earlier predictions that 1985 will be down may generally be correct.

Used unit sales have fallen off some, but that picture may change considerably in the next three months. Profits were rated from good to excellent.

MOTORHOMES

Most motorhome dealers held their own for the month. The difference between new unit sales last March and this is very small. Large dealers generally did a little better than they did last year and, surprisingly, a few of the smaller DAB dealers scored well. Larger dealers seem to be doing much better with Class A's than they are with C's; however, sales of C's are picking up for some DAB members.

Profits were rated from fair to good.

TRAVEL TRAILERS

After months of minuses, new travel trailer sales jumped into the plus column for a change. For the DAB generally, it was a rather even split between those who are ahead of last March's numbers and those who were behind.

Year-to-date, new sales have been sluggish. Dealers who used to sell 30 units a month now have to settle for a third of that number—and they are happy to get it. Used sales are down considerably for the year-to-date. There are a lot of used units on dealers' lots.

Profits were rated all the way from poor to good.

TRUCK CAMPERS

This category had the sharpest percentage drop of any in new unit sales. Last year, five members of the DAB reported sales for the month; this year there were only three. Campers are a tough business for the average multiline RV dealer.

Profits were rated excellent by two of the three dealers who made new sales, and fair by the other.

CAMPING TRAILERS

After a good 1984, it looks as if folding camping trailers are going to take it on the chin this year. Down 26 percent for the month and 25 percent for the year-to-date, it will take some doing to pull back to even; however, it is possible. Some camping trailer specialists have the potential to perform miracles at shows and can drastically change figures quickly.

Profits were generally rated from fair to good—a poor rating for this RV type.

FIFTH-WHEELS

After two good years, it looks as if fivers are in for a lull. Although the DAB picked up in March, the numbers for new units are way down. Used sales are good, however.

Profits ranged from fair to good—considerably different from excellent ratings for many, many months. Δ

Perspective is a compilation of data provided by RVB's Dealer Advisory Board (DAB), a group comprised of 23 dealers representing a cross-section of the U.S. Dealer body. This report is an attempt to reflect the current retail sales picture; it does not purport to indicate RV production or factory sales to dealers.

RVIA, MARCH

The marketing committee of the Recreation Vehicle Industry Association has announced that the total number of recreational vehicles shipped from manufacturers' plants during March 1985 was 34,400 units, down 17.3% from March 1984.

The shipment figures released by the association are contained in a report compiled for the membership by RVIA's marketing committee under the chairmanship of Allen Yoder Jr. of Jayco Incorporated, Middlebury, Indiana.

RV shipments were as follows in March 1985		March 1984	Percent Change	Cumulative 1985	Cumulative 1984	Percent Change
TRAVEL TRAILERS	7,000	8,400	−16.7%	16,500	21,600	−23.6%
FIFTH-WHEELS	2,000	2,000	0	5,000	5,000	0
TRUCK CAMPERS	700	1,100	−36.4%	1,600	2,100	−23.8%
MULTI-USE VEHICLES	13,600	17,000	+20.0%	41,800	40,400	+ 3.5%
TYPE A: MOTOR-HOMES	3,000	4,100	−26.8%	9,700	11,300	−14.2%
TYPE B: VAN CAMPERS	700	500	+40.0%	1,500	1,800	−16.7%
TYPE C: MINI MOTOR-HOMES	2,800	3,800	−26.3%	8,000	10,300	−22.3%
FOLDING CAMPING TRAILERS	4,600	4,700	− 2.1%	10,500	10,600	− 0.9%
TOTALS	34,400	41,600	−17.3%	94,600	103,100	− 8.2%

FOLDING CAMPING TRAILERS

Jayco "J" Series

Skamper 170C

Rapido Caravan

Rockwood

Freedom 400

Often overlooked, it's high time to take another look at this valuable segment of our industry

SHERYL DAVIS

To a potential RV consumer, one of the most intriguing notions about this industry is the fact that it has something for everybody. Units are available at retail from less than a couple of thousand dollars to a few *hundred* thousand dollars, offering buyers a fairy-tale wonderland of choices in between.

Where does the potential RV buyer begin the journey? Where is the trailhead into RV-land? That depends on need, finances and aesthetic preference. For many, all those determinants first come together in the folding camping trailer.

In 1984, 40,900 folding camping trailers were shipped—a full 10 percent of total 1984 RV shipments. This RV type is often the camper's first move up off the rock-hard, boulder bumps, stone-cold ground of tent camping into the world of RVing. It is also the frequent stepping stone into more posh camping digs, something all RV manufacturers and dealers can appreciate. In fact, this RV type can almost be used as a wind sock to check the direction and the strength of the winds of the general RV market. The reason is that newcomers to RVing often try out their wings with folding camping trailers. Later, as they mature in the RV lifestyle, they move up to other, more expensive classes of RVs. If the feed from the folding camping trailers is strong, the RV industry will be strong. If the output from this source dries up, you can pretty much bet that other RV types will be having a thin time down the road.

Why do so many consumers gravitate to this type of RV as an entry-level unit? When *RV Business* polled dealers and manufacturers, three general opinions surfaced repeatedly: the price is right, the tow weight is compatible with today's lightweight vehicles and it puts RVers in touch with nature much as tent camping does, but with amenities that

FOLDING CAMPING TRAILERS *continued*

allow for a much-appreciated indulgence of comfort.

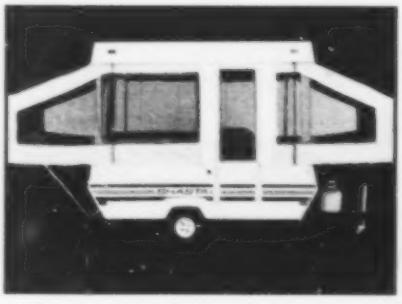
As far as price is concerned—and it is a concern to first-time RV buyers, especially—folding camping trailers are hard to beat, no matter what model or innovation might be the choice. Of the manufacturers who responded to our query, the lowest suggested retail prices reported were the Time Out 4-sleeper at $1350, Continental Industries' TravLite 25 at $1475 and a Coleman unit, which was $1495. For those who possess harder purses, Jayco's high-line entry prices out at approximately $7700. (Of course, all prices vary with the region and in regard to shipping.) Not only does the RV industry in general offer a wide range of financial choices to the buyer, but even the relatively narrow industry segment of folding camping trailers offers an extensive scale of selection for the judicious purchaser.

The importance of price for these units can be seen when one looks at the buyer demographics. According to the manufacturers who responded to our inquiries, their average buyer is a first- or second-time buyer between 30 and 40 years of age; earns a $20,000-$30,000 annual income; is married and has a couple of children; is well-educated and technically knowledgeable; and is either a professional employee, a skilled worker or is in management.

One exception to this demographic profile is found in the customers of Continental Industries' TravLite Model 123. Designed for motorcycles but towable by subcompact cars, TravLites sell to middle-age couples who are active in motorcycle touring.

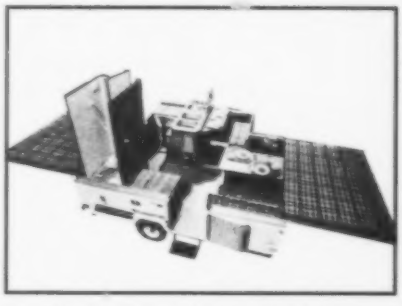
Folding camping trailers meet consumer requirements for towing weight, also. Since economics is frequently uppermost in the minds of buyers of this type, they often have fuel-economical cars. That, more often than not, translates into a smaller vehicle with less towing capability. Weight varies considerably with the unit, of course, but here are some examples of just how very towable this type of trailer can be: Kompact Kamp Mini-Mate, 500 pounds; Coleman's new Colorado (actually the revised Aspen), 575 pounds; Continental's TravLite 25, 600 pounds; Four Seasons' low-end model, 692 pounds; Freedom's 200, 300 and 400 models, from 690-850 pounds; T.O. Corporation's Time Out four-sleeper, 740 pounds; Texson's Cherokee five-sleeper, 810 pounds; the Valor Valiant VV-5, VV-6 from New Paris En-

Viking Spirit

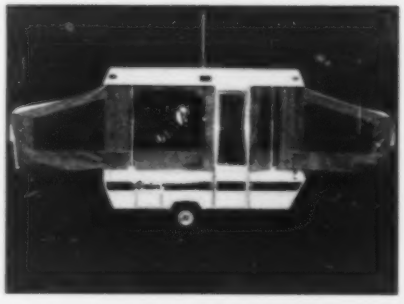


Shasta 1650

Palomino Fold-a-Wall



Four Seasons Chapparal Eagle I



New Paris Valor Warrior

Sun-Lite Red Bird III

Northstar T1600

terprises, 885 pounds; the Rockwood 706, 950 pounds; and Skamper's 114C, 980 pounds.

Towability is important to the consumer, too, of course. It is hard to beat folding camping trailers for towability. Their inherent low profile allows good rear-window visibility from the tow vehicle. It also cuts down on fuel-guzzling wind resistance. In addition, many manufacturers have streamlined their units even more for increased aerodynamics. The Coleman Company conducted a test on one of its units and found that, under the conditions of the test, towing added "only about one gallon of fuel consumption per 100 miles traveled."

Like the kid sister who "suddenly" turns into a stunning debutant, folding camping trailers are beginning to blossom. What used to be little more than an orange crate on wheels, carrying a few folding chairs and a couple of sleeping bags, now sports amenities that—be they ever so humble—sometimes rival Home Sweet Home. Today's folding camping trailers may be equipped with electricity, real refrigerators, stoves, running water, heating systems—even showers and air conditioning.

There are innovative breakthroughs every year. Sometimes, though, it is difficult to see just what these wonderful appointments are, especially if one is not in the habit of perusing the market each year with an eye open to change. But this year, there are a number of important changes along with the lesser ones. Some of these changes impart an air of respectability and durability to these units. It is worth noting that, even though Coleman and Starcraft hold far and away the lion's share of the folding camping trailer market, many of the smaller, less-well-known companies are making great strides in technical and aesthetic aspects of this RV type.

Bonair units, for example, have four independent cables that elevate the roof. Says Export Director Claude Côté, "Even if one cable breaks, the trailer can still be put up with the remaining three." Starcraft has also done work on its lift system. Its big news is a positive stop mechanism on its crank-up lift system which, says President Don Cuzzocrea, prevents overcrank. It is reassuring to note that safety seems to be uppermost in the corporate mind of these and other manufacturers.

Skamper has a patented crank-up raising system, rather than an electric one. They say it is because the manual system does not require as many moving parts—which can fail. The fully enclosed single-cable system is accessible from beneath the trailer. A five-year guarantee is offered.

Jayco features a lifter system that is interesting, if not new. Sherman Hansen, head of sales and marketing, notes that "it is fully enclosed inside the unit to protect it from dirt and moisture. It requires only one person to operate, and the lifter posts do not have cables running inside them to tangle and break." The lifter system is covered by a lifetime limited warranty to the original owner.

The Esterel lift system utilizes gas-cylinder pistons (the type used to lift the rear hatch on many small cars) for easy setup. The entire unit is a rather nifty affair. For the nitty gritty lowdown, see the complete report in our sister publication, *Trailer Life*, January 1985.

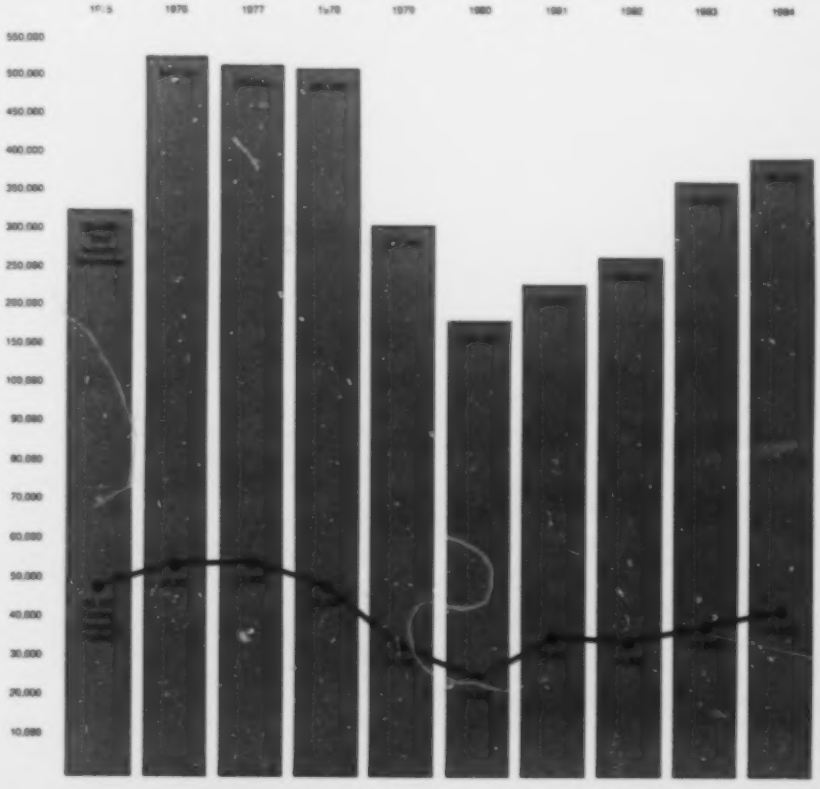
New Paris Industries also values its lift system. In fact, the Indiana-based company offers a lifetime lift-system warranty on all of its new Valor folding camping trailers.

Oftentimes inclement meteorologic conditions inspire appreciation for extra care in RV design and execution. For example, Bonair—which distributes in Canada, New England, the Midwest and West Virginia—constructs fully insulated polyurethane injected roofs that are one piece with no seam, and are rounded so water will drain off. Northstar's models also feature a light one-piece laminated roof. TravLite has gone hardtop this year, adding a two-sleeper top unit with 6.5 feet of headroom and 20 feet of storage. Sun-Lite is another company that has jumped on the one-piece-roof bandwagon, and has included a large roof vent as well.

Anyone who has had to replace an entire canvas, because of one little tear that quickly progressed from a small annoyance to a vent the size of the Great Rift Valley of Southwest Asia, can ap-

COMPARATIVE SHIPMENT FIGURES 1975–1984

Folding Camping Trailers/Total Industry Shipments



Data courtesy of Recreation Vehicle Industry Association

FOLDING CAMPING TRAILERS *continued*

preciate that Bonair has designed a sectional canvas, allowing replacement of only the damaged section.

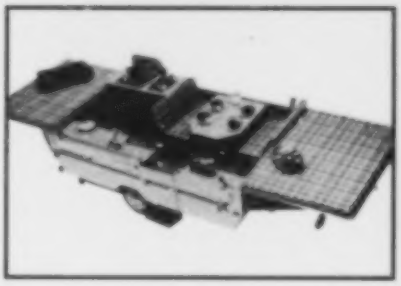
One of the most innovative items on the market is the expando room concept implemented on two models from Four Seasons. On these units, one entire sidewall pulls out with only 4-5 pounds pressure to provide 51 percent additional floor space. They are still lightweight and towable with compact vehicles; the hitch weight is a mere 73-150 pounds.

According to Four Seasons' President Bill Entrup, these two models have bathroom walls that extend floor-to-ceiling and a solid door. Both units have a hot water shower option that features a 26-gallon water supply. If the customer elects to purchase the shower/hot water heater option, he gets a 6-gallon quick-recovery hot water heater, plus a 3-gallon-per-minute demand water system and dual control hot/cold kitchen sink faucet—and the kitchen sink is a double basin. Depending on the model, these units can accommodate from three to eight people.

Another model, the Apache Royal features solid state walls made of ABS thermoplastic panels. An interior folding wall separates the dining/living area from a bathroom, dressing room and a 32-inch square shower.

Esterel Supermatic

Coleman



Siarcraft

Apache Ramada

An entire series of Fold-A-Wall units has been added to Palomino's consumer-ready lineup. In addition, Palomino now offers a tent fabric they call Vinylution. It is said to combine "the strength and durability of vinyl with the breathability of Evolution-3 fabric."

While other companies are into the more obvious additions and revisions, Shasta has turned its attention to detail. One such item is its new pullout galley

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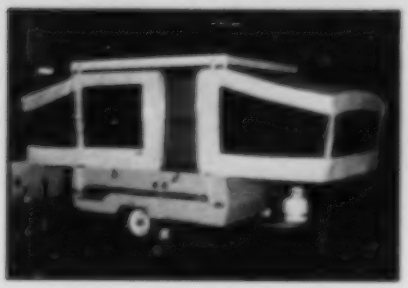

Texson

Coachmen

Bonair BA-1000

Time Out

TravLite

Kompact Kamp Mini-Mate

drawer with a travel lock. Anybody who has ever traveled with a recalcitrant drawer that spills its insides at every corner knows why such detail can be important to an RV owner.

The Cherokee from Texson is middleweight and midpriced for the medium-size family. It sleeps five; so, it will accommodate the average American family's 2.2 children.

Sun-Lite reports good public response to its new Fire Bird V folding camping trailer that allows cooking both inside and outside the unit, and sports two bed wings. The Firebird V joins the Sun Bird II and the Red Bird in Sun-Lite's lineup of units designed for smaller cars. Sun-Lite also offers a folding truck camper with models that fit both the minitrucks and the ½-ton trucks. Another new venture for Sun-Lite is its im-

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FOLDING CAMPING TRAILERS *continued*

port handling and sole distribution of the Rapido Caravan, a French-built hardwall folding camping trailer.

Viking's newest models sport several buyer-attracting new features including a metal underbelly, a mirror in the upper door, radius-cornered cabinetry, 4-inch cushions, a 9-amp converter, 12-gallon freshwater capacity, a three-burner range and a porch lamp. It also has laminated bunks, independent suspension, separate amber turn-signal wiring and Krystal Kote metal. The Viking Spirit camping trailers feature Evolution-3 tenting, extra-wide-track spring axle, Krystal Kote side metal, a three-burner range (except the 1300), a 6-amp converter, 9-gallon freshwater capacity and a storage drawer in the galley area.

Rockwood's innovations include no-scrub vinyl flooring, a deluxe folding storm and screen door, and all-new stain-resistant Herculon upholstery.

While not every manufacturer has an earth-shattering new presentation, several have opted to add new models to their lines. Among them is Starcraft, with three new models. Both its Starlite and All Star series sport side dinette floorplans, and the 19-foot Starlite has

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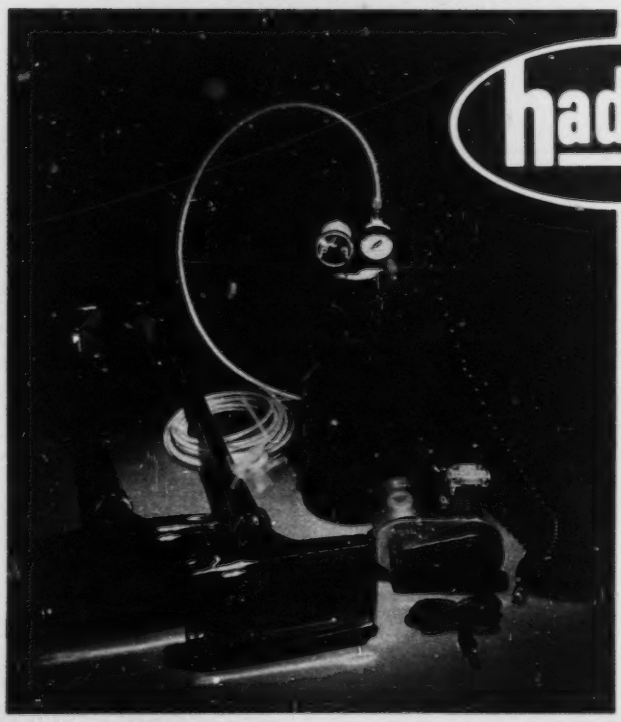

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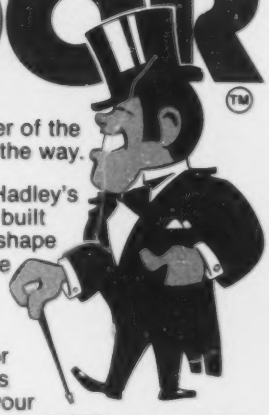

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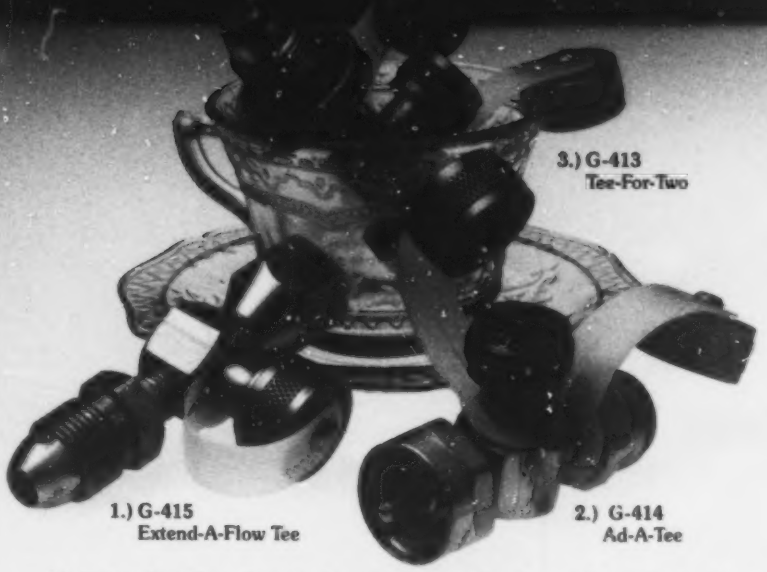

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FOLDING CAMPING TRAILERS *continued*

Coleman Adds New Line

Coleman Plantation Tara

Coleman has made big news in the folding camping trailer industry with its brand new Plantation series. In fact, to draw attention to the important differences this series presents, Coleman likes to refer to the new line as "folding trailers" rather than folding camping trailers. The major thrust of the company's new approach to this market is the provision of a luxury-level line that can be towed behind midsize cars.

To accomplish this, Coleman began with the already innovative solid-wall format and added its own special touches. The Tara model, for example, has a step-down galley. An interior folding wall creates a master suite with queen-size bed and tub/shower/potty compartment. The Savannah has separate tub/shower room also, but the floorplan makes it more like a regular bath than a master suite arrangement. The Savannah will sleep six—as opposed to Tara's sleeping quarters for seven. Both models have folding interior hard walls—imparting unprecedented privacy in this type of unit.

The Plantation series' road height is 54 inches. The added height allows a stationary galley. Only the folding walls for the bathroom require setup. Interior setup height is a full 79 inches, but Coleman says the curb weight still passes well under the 2000-pound mark at 1865 pounds. The Plantation series includes interior storage space, color-coordinated high-gloss enameled sink, oven, gas furnace, wardrobe/love seat, refrigerator and decorator-coordinated cotton/polyester draperies with undercurtains in this new line.

52-inch end mattresses. Freedom's new 300 and 400 lightweight models feature molded aerodynamics and double beds 6 feet 8 inches long. Jayco has added two deluxe models and a new 1208 eight-sleeper has been added to the economy "J" Series line.

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FOLDING CAMPING TRAILERS *continued*

make folding camping trailers are quite proud of their wares—so much so that they tout their virtues whether they are new or not. TravLites feature heavy-duty steel frames, for example, and one-piece molded high-density polyethylene bodies. Starcraft models have independent suspension as a standard feature on all Starlite Series models. A deluxe option group offers a carryout stove, decorator cabinetry and designer drapes.

While a portable toilet is standard on Apache's five new models, an optional flush toilet is offered with 9½-gallon holding capacity. A laundry hamper is provided beside the shower, and the galley features a permanently mounted range hood with light and power exhaust. An overhead cupboard is next to the hood.

Bonair says its roof can carry an equally spread 600-pound load on its roof. The sectionalized aluminum exterior is said to facilitate repairs. The moldings are all baked enamel-painted aluminum. Marine-type plywood comprises the flooring. According to Côté, no chipboard is used in Bonair's units, just plywood.

Freedom—making a good showing in its first year in the industry—is proud that it offers a full range of lighting, water systems, LP-gas cooking features, 12-inch wheels and independent trailing arm suspension. The tent is offered in a variety of colors for the color-conscious consumer.

Coleman has upgraded its economy Pioneer line to now include a power converter, step light, drapes and a waist-level crank system. The deluxe Americana line now boasts plush fabrics and living decor. Last year's successful side dinette has been included in the Pioneer line's Chesapeake. Some Coleman units feature showers and air conditioning.

Recently, Coleman introduced a new line of high-sided, larger tent trailers called the Plantation series. Some models feature folding hard interior walls and "master bedrooms." One version offers a step-down galley. *(See page 68.)*

Rockwood has made concerted efforts to eliminate problems and implement new features. Its units have wide-track axles, a curved roof, vacuum-formed aerodynamically designed construction, a one-piece floor, a high-rise kitchen counter, a fingertip slide-out system for bunks, self-storing bunk supports, and an all-new gear and chain drive for the lifter system.

Jayco gives special attention to storage capacity that includes overhead cabinets, a wardrobe, pullout pantry and a vanity with lots of drawer space in many models.

Esterel is another manufacturer that combines towability and sturdiness with

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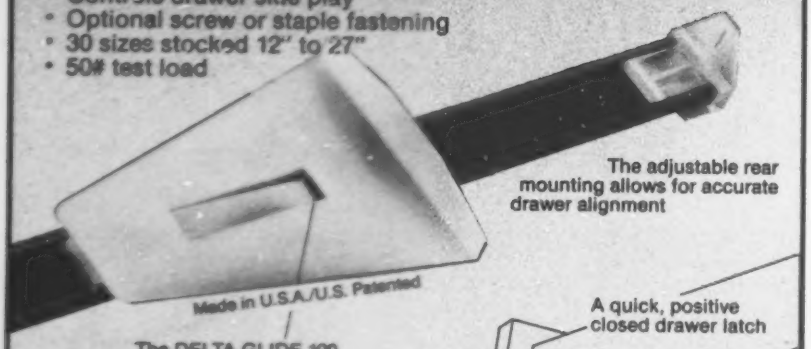

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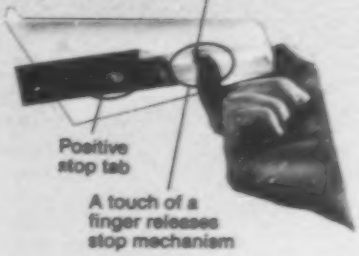

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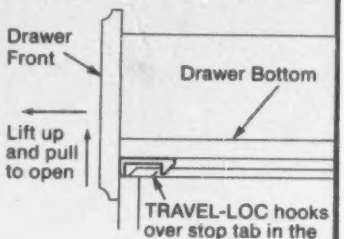

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FOLDING CAMPING TRAILERS *continued*

its folded hard walls of Styrofoam sandwiched between interior paneling and exterior fiberglass or metal. Its undercarriage and belly pan are undercoated, and even the windows are double-insulated against immoderate weather.

Newly styled graphics on Shasta's scratch- and dent-resistant aluminum skins may be the first thing you notice. Inside, though, under the Evolution-3 or 10.10-ounce canvas tent are 3-inch-thick high-density mattresses and cushions. Maintenance is facilitated by the use of vinyl floor covering and stain-resistant fabrics. All models sleep six people except the 1300 model, which sleeps four.

Coachmen's models are available in lengths ranging from 13 to 18.5 feet. Canvas tenting has been replaced by Evolution-3 fabric. New metallic graphics top the unit that rides on automotive-style suspension. The flip-up galley has a new galley drawer cover. Options range from a portable toilet to a boat rack or electric brakes.

The Texson Cherokee features independent wheel suspension, 12-inch automotive tires with five-lug-bolt pattern, all-vinyl canvas, 4-inch-thick cushions and a pop-up kitchen. Tinted vinyl, zippered windows are designed for light filtration with easy viewing.

A new company to watch on the folding camping trailer horizon is Landmark, which is in the process of building its first prototype. *(For more on Landmark, see "Industry News" on page 99.)*

There you have it: price, towability and amenities—the big appeal. "A guy came in here and sold his '84 Class A and bought one of our folding trailers," reports one manufacturer. It's different strokes for different folks; fortunately, the folding camping trailer is the stroke that appeals to a significant segment of the buying public.

All that the public has to know now when they arrive at the dealership in a buying frame of mind is what to call the things. Our query to the manufacturers turned up these statistics: 33 percent prefer "folding camping trailer." Starcraft's Cuzzocrea points out, "It describes what it is." He also voted for "fold-down camping trailer" for the same reason; 20 percent of the manufacturers surveyed favored that term. "Camping trailer" enjoyed the same percentage of votes. "Fold-down trailers" received a meager 13 percent of the votes, while "folding camper" brought up the rear with a mere 6 percent of the voters' favor. Eight percent did not indicate a preference. Interestingly, however, a good number of the respondents across the board who voted for these more formal titles, in the next breath referred to their units as "fold-downs." A rose by any other name. . . . Δ